

PROCUREMENT ADVISORY No. 118 B

Solicitation Review Process

1. SUMMARY

This advisory establishes a review and approval process for all solicitations with an estimated value of twenty-five million dollars (\$25,000,000) or greater. Revision B adds follow-up guidance. Previously, Revision A added a checklist (Attachment A) and additional guidance for solicitation review submittal and adjusts the review times.

2. BACKGROUND

It is essential that acquisition activities effectively support USDA mission and program objectives. To assist in this effort, and to provide an additional level of oversight to reduce risk and enhance procurement outcomes, the Office of Procurement and Property Management (OPPM) will review all high value acquisitions prior to the solicitation release.

3. REFERENCES

- a. Delegations of Authority for the Assistant Secretary for Administration; Director, Office of Procurement and Property Management, Title 7 CFR § 2.93 (a)(2).
- b. Federal Acquisition Regulation (FAR) Subpart 7.1, entitled *Acquisition Plans*.

4. ACTIONS

- a. Heads of Contracting Activities (HCAs) or their Designees (HCADs) Responsibilities. HCAs or HCADs shall submit to OPPM's Senior Procurement Executive (SPE) and to the Procurement Policy Division (PPD) at procurement.policy@dm.usda.gov ALL documents described below for solicitations with an estimated value of \$25 million or greater. These documents shall be submitted prior to solicitation release with time allowed for the review (see paragraph 4.b., below). Agencies should include the solicitation review time as part of their acquisition milestone chart/planning.

Attachment A, entitled, "Checklist" shall be completed by the contracting activity and submitted with the following documentation for review:

- (1) Agency Information.
- (2) Solicitation Title and Description.
- (3) Acquisition Plan, prepared in accordance with FAR 7.105, with special attention given in addressing the following elements:
 - i. High-risk types of contracting
 - ii. Competition
 - iii. Options
 - iv. Government cost estimate
 - v. Contract type and contracting approach

- (4) Address the applicability of other USDA procurement guidance such as:
 - i. Procurement Advisory 101, *Shared First Policy in USDA Contracts*
 - ii. Procurement Advisory 117, *Prohibition on Use of Unpriced Options*
 - iii. Departmental Regulation 5039-007, *Delegation of Procurement Authority for Information Technology*
 - iv. Other guidance or policy, as applicable.
 - (5) Office of Small and Disadvantaged Business Utilization (OSDBU) approval,
 - (6) Proposal evaluation factors and significant sub-factors,
 - (7) Solicitation documents including:
 - i. Contract line items, services, or supplies being acquired, and
 - ii. Performance work statement or statement of work.
 - (8) Agency policy review, if a review was completed.
 - (9) Legal counsel review, if a review was completed.
- b. Procurement Policy Division (OPPM/PPD) Responsibilities. OPPM's PPD will conduct the solicitation review. The PPD Chief or staff members will notify the HCAD when the review is complete or will request additional information from the contracting activity for action or resubmission, if needed. The PPD review will be completed within 15 business days of receipt of all pertinent information. However, information or documents not submitted by the agency may extend PPD's review period. Agencies should include the OPPM review time into the procurement milestone schedule.
 - c. Incomplete Submissions and Follow-Up. The HCAD is responsible for following up with PPD to resolve any comments or issues raised upon receipt of an approval memorandum from the Senior Procurement Executive. Any issues raised by PPD shall be addressed in writing by the contracting activity and provided to OPPM.
 - d. Solicitation Release. No applicable solicitation shall be released prior to completion of the review and receipt of an approval memorandum from the Senior Procurement Executive.
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Procurement Advisories are issued by the Procurement Policy Division of the Office of Procurement and Property Management, Departmental Management, USDA, and posted on the World Wide Web at <http://www.dm.usda.gov/procurement/policy/advisories.html>. If you have questions or comments regarding this advisory please send an email message to procurement.policy@dm.usda.gov.

EXPIRATION DATE: Effective upon issue date until canceled.

CHECKLIST

Attachment A

Procurement Advisory 118

Number	Primary Item	Elements	Element/ Item Addressed		Notes If not addressed, please explain why
			Yes	No	
1.	Agency Information	a. Name of the solicitation contracting point of contact (SF 1449, block 7a, if applicable)			
		b. Telephone number of the solicitation contracting point of contact (SF 1449, block 7b, for example.)			
		c. Issuing Agency, name and address (SF 1449, block 9, for example)			
		d. Administering Agency, name and address (SF 1449, block 16, for example)			
2.	Solicitation Title & Description	a. Solicitation title			
		b. Schedule of Supplies/Services (SF 1449, block 20)			
		c. Contract Type.			
		e. Description.			
3.	Acquisition Plan, (In accordance with FAR 7.105)	a. High-risk contract types			
		b. Competition			
		c. Contract options			

		d. Government cost estimate			
		e. Contract type			
		f. Contracting approach			
4.	USDA guidance	a. Procurement Advisory 101, <i>Shared First Policy</i>			
		b. Procurement Advisory 117, <i>Prohibition on Use of Unpriced Options</i>			
		c. Departmental Regulation 5039-007, <i>Delegation of Procurement Authority for IT</i>			
		d. State other guidance, as applicable.			
5.	Office of Small and Disadvantaged Business Utilization (OSDBU) Approval	OSDBU review or notification			
6.	Evaluation Factors	Factors and significant sub-factors			
7.	Solicitation Documents	a. Contract line items, services, or supplies being acquired			
		b. Performance work statement or statement of work			
8.	Agency policy review , if any review was done	Policy or legal review comments			